



## **REQUEST FOR PROPOSALS (RFP) FOR PROFESSIONAL SERVICES**

### **Equity in Planning Outreach Toolkit**

**The City of South Burlington is seeking the services of a qualified professional or firm(s) to develop a framework for future public outreach for city planning projects**

**Date of Issue: November 15, 2023**

**Proposal Deadline: December 20, 2023**

#### **Submissions emailed to:**

Kelsey Peterson, Senior City Planner  
[kpeterson@southburlingtonvt.gov](mailto:kpeterson@southburlingtonvt.gov)

**Anticipated Budget:** \$28,890 (including \$2,890 municipal match and \$26,000 grant award)

#### **Project Description**

The City of South Burlington is seeking to improve and broaden its public engagement in planning projects. We are a city of approximately 20,000 residents in Vermont. We are the second largest municipality in the state by population. We are located in Chittenden County, the most densely populated area of the state and the area with the highest New American population and highest racial diversity in a very low-diversity state.

Currently, the City primarily uses a combination weeknight, evening public meetings, online platforms, and print media for public outreach in planning. On a case-by-case basis, supplemental outreach tools are used. During recent planning processes, we have made attempts to reach greater and more varied cross-sections of our City residents through using online polls, webforms, meetings scheduled on varying days and times, and providing snacks and childcare. However, we recognize that we don't know what we don't know and we are working only from our own perspectives and understanding of what barriers may be to public participation, what methods of outreach and response would be best, and what groups, communities, and individuals we are failing to reach.

Our goal is to develop a scalable toolkit for public engagement that helps us identify how to deploy the resources and funding available for each project's outreach to best reach and provide real opportunity for our diverse community to participate and shape future policy in City.

We want to use planning outreach to build trust between our residents and the City government. We want to set community expectations for how the community will be able engage with and help shape the outcomes of planning projects in a predictable manner.

## **Scope of Work**

We seek consulting assistance in developing a toolkit or framework for our public engagement in planning projects. This includes background research on best practices in equitable public outreach in the planning context and municipal government processes. We are anticipating that this includes searching for and analyzing policies from other municipalities and entities, especially in New England and/or from municipalities of a similar size. It will also include identifying groups, communities, and individuals who are present in South Burlington but we are not generally seeing in our public outreach responses to date.

In developing this toolkit, the selected consultant will be responsible for outreach on the Equity Toolkit project itself.

This likely will include both identifying and engaging with community leaders and groups (or their representatives) and conducting outreach on what methods for communication and feedback would be most effective for them in the future and how the City can work to decrease barriers to participation. In doing so, we would expect the consultant to be cognizant of the demands being placed on underrepresented groups' time and resources with so many entities developing equity policies and collect as much information as possible from our neighboring municipalities, and regional and state partners who have already sought information from these groups. The form of outreach would be designed by the consultant and would be expected to place equity considerations at the forefront.

## **Deliverables**

We are seeking a framework, toolkit, or similar that the City will be able to utilize in outreach processes on planning & scoping projects. It will need to be scalable to larger/broader projects (such as a Parks Master Plan; Housing Needs Assessment, or update our long range City Plan) and to smaller/narrower projects (such as scoping for a roadway intersection improvement or design of a dog park).

The toolkit will, importantly, include a process for identification of target groups who may be particularly affected in a given project, communication with groups and individuals in ways that are most effective for the recipients, and determination of best feedback/response mechanisms.

The form of the deliverable product can be proposed by the consultant in discussion with the City project team.

It is expected that drafts would be produced by the consultant that are presented to the public for review and feedback, and for review and feedback from the City project team.

## **Project Timeline**

Proposals shall show how the consultant proposes to conform to the following broad timeline outline. Reasonable modification will be allowed with discussion with the City

- February 2024: Project planning and background research
- March-April 2024: Initial public outreach on toolkit project

- April-May 2024: Prepare Equity Toolkit draft (or similar deliverable)
- May 2024: Public outreach on draft
- June 2024: Update draft and meet with City
- July 2024: Final deliverables provided to City

### **Project Oversight Structure**

The consultant's primary point of contact will be the Senior City Planner.

The project will be led by a city project team, which will consist of a small team of city staff and external representatives. The consultant will be expected to meet regularly with the project team to report progress.

The project will likely, further, be guided by an identified advisory group or similar structure. This advisory group will consist of identified community leaders/groups and will participate/meet periodically to provide guidance on the overall project. The consultant will be expected to engage with these advisory group members individually and/or in period meetings.

### **Submission Requirements**

Submittals should be provided in digital PDF version and include the following items, along with other material to demonstrate Consultant's expertise and capability:

1. Proposed Approach: A brief written description of the Consultant's approach to the project.
2. Qualifications and Staffing: The expertise of the team assembled by Consultant to carry out the work, including indication of lead consultant, role of each team member, and detailed information on each consultant's relevant experience on similar projects.
3. Experience: A list of comparable projects undertaken by Consultant and/or team members.
4. Proposed Schedule: A schedule that includes completion of work tasks and deliverables, including approximate timing of outreach, and complies with the Project Timeline.
5. Detailed Budget Proposal: A detailed budget broken down by task and team member, including overhead costs, hourly rates for individuals involved, and anticipated hours per task and team member.
6. References and Sample Work Product: A minimum of two (2) professional references and a sample of the lead consultant's work product similar to this project.

Proposals must be formatted to be easily printable on standard 8.5" x 11" pages. Respondents should submit one (1) PDF of the proposal by December 20, 2023 to:

Kelsey Peterson  
Senior City Planner  
City of South Burlington  
180 Market Street  
South Burlington, VT 05408  
kpeterson@southburlingtonvt.gov

Please expect a confirmation email upon receipt of the proposal by the City of South Burlington. If you have any questions about this project or RFP, please email them to Kelsey Peterson. We will respond to all questions in writing within seven (7) days. Both the questions and responses will be shared with other respondents. Proposals received after the deadline will not be accepted.

### **Selection Process & Criteria**

Respondents will be evaluated according to the following factors:

1. Consultant Qualifications (experience with similar projects, ability to work with municipalities to attain desired outcomes, and knowledge of the topic)- 40%
2. Scope of work (including compliance/responsiveness with RFP parameters), fees, methodology and schedule- 40%
3. Proposal quality, completeness, and clarity- 20%

Proposals will be reviewed by a selection committee comprised of representatives from the City of South Burlington. A short list of consultants may be selected for interviews. The selection committee may ask respondents to give an oral presentation of their proposals. The purpose of this oral presentation is to provide an in-depth analysis of certain qualifications, experience in performing similar services, and an opportunity for the consultant to clarify or elaborate on their qualifications without restating the proposal. The interview and presentation, if deemed necessary by the selection committee, will be held via Zoom or similar online platform. The day and time will be notified to the respondents at least three (3) business days prior to the meeting. Each interview will last 45 minutes, and will be comprised of a presentation and Q&A.

A top-ranked proposal may be selected and invited to work with City staff to develop a final scope of work, budget, timeline, and related contractual obligations. All costs and expenses incurred in preparation and submission of a proposal, including but not limited to an interview and presentation, shall be the responsibility of the consultant.

The City will be required to follow its standard procurement procedures. No proposal will be considered accepted until all applicable City authorizations are received and an agreement is executed by both parties.

### **Schedule Summary**

Proposals due: December 20, 2023

Interviews: early January 2024

Consultant selection by: January 12, 2023

Project work to begin by: February 1, 2023

Complete project by: July 15, 2023

## **Additional Terms**

This RFP is governed by the following terms and conditions.

### **a. Contracting**

The Consultant, prior to being awarded a contract, must apply for registration with the Vermont Secretary of State's Office to do business in the State of Vermont, if not already so registered. The registration form may be obtained from the Vermont Secretary of State, 128 State Street, Montpelier, VT 05633-1101, PH: 802-828-2363, Toll-free: 800-439-8683; Vermont Relay Service – 711; web site: <https://www.sec.state.vt.us/> . The contract will not be executed until the Consultant is registered with the Secretary of State's Office.

Prior to beginning any work, the Consultant shall obtain Insurance Coverage and provide a certificate of insurance coverage documented on forms acceptable to the City.

### **b. Agreement Requirements**

The selected consultant will be required to execute a contract with the City on the terms and conditions required by the City.

### **c. Limitations of Liability**

The City assumes no responsibility or liability for the response to this Request for Proposals.

### **d. Costs Associated with Proposal**

Any costs incurred by any person or entity in preparing, submitting, or presenting a proposal are the sole responsibility of that person or entity, including any requests for additional information or interviews. The City will not reimburse any person or entity for any costs incurred prior to the issuance of the contract.

### **e. Indemnification**

Any party responding to this Request for Proposals is acting in an independent capacity and not as an officer or employee of the City. Any party responding to this Request for Proposals will be required to indemnify, defend, and hold harmless the City, its officers, and employees from all liability and any claims, suits, expenses, losses, judgments, and damages arising as a result of the responding party's acts and/or omissions in or related to the response.

### **f. Rejection of Proposals**

The City reserves the right to reject any or all proposals, to negotiate with one or more parties, or to award the contract to the proposal the City deems will meet its best interests, even if that proposal is not the lowest bid. The City reserves the right to re-advertise for additional proposals and to extend the deadline for submission of the proposals. This Request for Proposals in no way obligates the City to award a contract.

### **g. Ownership of Documents**

Any materials submitted to the City in response to this Request for Proposals shall become the property of the City unless another arrangement is made by written agreement between the City and the responding party. The responding party may retain copies of the original documents.

#### **h. Duty to Inform City of Contract Document Errors**

If a bidder knows, suspects, or has reasonable cause to believe, that an error or omission exists in any contract documents, including but not limited to unit prices and rate calculations, the bidder shall immediately give the City written notice thereof. Consultant shall not cause or permit any work to be conducted that may related to the error or omission without first receiving written acknowledgment from the City that City representatives understand the possible error or omission and have approved the requested modifications to the bid or contract documents or that the consultant may proceed without any modification being made to the bid or contract documents.

#### **i. Public Records**

Any and all records submitted to the City, whether electronic, paper, or otherwise recorded, are subject to the Vermont Public Records Act. The determination of how those records must be handled is solely within the purview of City. All records the responding party considers to be trade secrets, as that term is defined by subsection 317(c)(9) of the Vermont Public Records Act, or that the responding party otherwise seeks to have the City consider as exempt must be identified clearly and specifically at the time of submission. It is not sufficient to merely state generally that a proposal is proprietary, contains a trade secret, or is otherwise exempt. Particular records, pages, and sections which are believed to be exempt must be specifically identified as such and must be separated from other records with a convincing explanation and rationale sufficient to justify each exemption from release consistent with Section 317 of Title 1 of the Vermont Statutes Annotated.

#### **j. Public Health Emergencies**

Bidders are advised that public health emergencies, as declared by the City, the State of Vermont, or the Federal Government, including the current pandemic of Novel Coronavirus (COVID-19), may introduce significant uncertainty into the project, including disruption of timelines or revised practices. Consultants shall consider public health emergencies as they develop project schedules and advance the work. The City may require a public health emergency plan be submitted as part of the contract. This plan will contain:

- 1) Measures to manage risk and ensure that potential impacts to safety and mobility are mitigated in accordance with health and safety standards and guidelines proposed by local, state, and federal agencies;
- 2) A schedule for possible updates to the plan in advance of the start of work; and
- 3) Means to adjust the schedule and sequence of work should the emergency change in nature or duration.

The City will have sole discretion to approve, deny, or require changes to this plan as a condition of consideration of the bid, will retain the right to inspect all work to ensure compliance with health and safety standards, and may at any time require the consultant to stop work because of the emergency.

If a public health emergency is declared, the City will not be responsible for any delays related to the sequence of operations or any expenses or losses incurred as a result of any delays. Any delays related to public emergencies, including the current pandemic of Novel Coronavirus (COVID-19), will be excusable, but will not be compensable.